#### **APPENDIX D**

#### PROPOSAL EVALUATION and SCORING PROTOCOLS

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Public School Watershed and Fishery Conservation Education Projects (ED)	D6
Fisheries Conservation (FC)	D7
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Barrier Modification for Fish Passage (HB) and Instream Habitat Restoration (HI)	D9
Research Projects (RP)	D10
Advisory Committee Review	D11

### **Technical Review Team Level Review**

posal Name:  BDSFES Technical Review Team (TRT) conducts two levels of rigram. The initial TRT review is for the purpose of identifying pote		
uncertainties contained in the proposal that need to be addresse ess. During the second level of review, the TRT determines who	ed during the subsequent proposal	evaluation
es have been resolved, failure of which may result in a zero score mation/material will be accepted after the final proposal submiss		
mation/material will be accepted after the final proposal submiss	ion deadline per the following con-	uitions.
<ul> <li>The information/material is submitted to the regional field of the TRT.</li> </ul>	d evaluator prior to the second leve	el review mee
<ul> <li>Amount of requested funds must remain the same or less</li> </ul>	s than the amount requested on th	ne nronosal
received prior to the submission deadline.	s than the amount requested on the	іе ріорозаі
Criteria	Initial	Follow-
	Review	up Needed?
1. The proposed project is consistent with BDSFES legislative i		Needed:
sport fish populations, sport fishing opportunities, and angler		
2. The proposed project is within the BDSFES geographic rang		☐ Yes
Francisco Bay-Delta and the main stem of the Sacramento a Joaquin rivers, including major tributaries, below the most do dam.		□ No
The proposed project is not required mitigation.	☐ Yes	☐ Yes
	□ No	□ No
4. The proposal is complete as required by the PSN and Apper	ndix A. If not,  Yes	☐ Yes
list the documents that are missing.	□ No	☐ No
5. The proposal has demonstrated sufficient landowner access		☐ Yes
and cooperation needed for successful completion of the pro	- 110	□ No
6. The proposal is sufficiently understandable to enable evalua-		☐ Yes
detailed enough to enable a contract to be written with discre- products, and budget.	ete tasks, work	□ No
7. The proposed project can be completed within the proposed	time frame.	☐ Yes
	□ No	□ No
8. All environmental documentation required for the proposed p	project has 🔲 Yes 🗌 N/A	□ Yes
been completed. If not, describe what type of documentation and where you are in the process:	n is required No	□ No
The proposed project requires Endangered Species Act con	sultation.	☐ Yes
If yes, describe where you are in the process:		□ No
10. The proposed project is consistent with applicable Fish and		☐ Yes
Commission policies.	□ No	□ No
Note: N/A = Not Applicable		1 =
project received comments/coordination from any other concern-	ed agencies (NMFS, RWQCB, etc	:.)?

#### **Cost Analysis Evaluation**

Evaluation of project cost analysis will include the following:

- Comparison of wages, equipment rates, material costs, and other project costs for similar completed and proposed project work within similar geographic regions.
- Review of labor costs identified by Department of Industrial Relations General Prevailing
  Wage Determinations (<a href="http://www.dir.ca.gov/">http://www.dir.ca.gov/</a>), Davis-Bacon labor rates
  (<a href="http://www.access.gpo.gov/davisbacon/">http://www.access.gpo.gov/davisbacon/</a>), and recent California Employment Department wage data
  (<a href="http://www.labormarketinfo.edd.ca.gov/cgi/career/?PAGEID=3&SUBID=152">http://www.labormarketinfo.edd.ca.gov/cgi/career/?PAGEID=3&SUBID=152</a>).
- Review of regional equipment rental cost information (including the most current version of California Department of Transportation's (CalTrans), Labor Surcharge and Equipment Rental Rates publication (<a href="http://www.dot.ca.gov/hq/construc/equipmnt.html">http://www.dot.ca.gov/hq/construc/equipmnt.html</a>).

Cost analysis evaluation will consider project logistics (e.g. site remoteness, accessibility, coordination required with multiple land holdings), review of production rates/labor requirements in the regional area, and benefit to the recovery of sport fish species.

# **Matching Funds Scoring Matrix**

Proposal#:	Project Type:	Region:	Reviewer:	Date://	-
Proposal Name:					
% Soft Cost Share =	= (Soft Matching Fun	ds / Total Project Co	•	=	
% Hard Cost Share	= (Hard Matching Fu	nds / Total Project C /	ost) x 100	00 =	

#### Matching Funds

- 1. <u>Cost share not suitable:</u> projects, personnel or supplies and equipment previously funded by the BDSFES Program; cost share funds that will not be acquired by May 1, 2009.
- 2. <u>Soft cost share:</u> salaries of permanently funded employees working for the applicant or its partners (i.e. state, federal and local government employees, employees of non-profit organizations, etc.); office space, equipment, and supplies; pre-existing vehicles, administrative overhead.
- 3. <u>Hard cost share:</u> all out-of-pocket costs specifically associated with the proposed project (i.e., the cost of subcontractors, fuel, outside printing of educational and outreach materials, riparian plants, equipment (pro-rated or rental rate), skilled labor, cash, subcontractors, permits, easements, and fuel.

BDSFES cost share scoring matrix from level of soft and hard matching funds and resources:

		% Hard Match									
% Soft Match	90-99 %	80-89 %	70-79 %	60-69 %	50-59 %	40-49 %	30-39 %	20-29 %	10-19 %	5-9 %	0-4 %
90-99 %	5	5	5	5	5	5	5	5	5	5	5
80-89 %	5	5	5	5	5	5	5	5	5	5	5
70-79 %	5	5	5	5	5	5	5	5	5	5	4
60-69 %	5	5	5	5	5	5	5	5	5	4	4
50-59 %	5	5	5	5	5	5	5	5	5	4	3
40-49 %	5	5	5	5	5	5	5	5	4	3	2
30-39 %	5	5	5	5	5	5	5	5	4	3	2
20-29 %	5	5	5	5	5	5	5	4	4	2	2
10-19 %	5	5	5	5	5	5	5	4	3	2	1
5-9 %	5	5	5	5	5	5	4	3	2	1	0
0-4 %	5	5	5	5	5	5	4	3	2	1	0

# **Angler Education and Information (AE)**

osal#: Region: Reviewer: osal Name:			ate:/	
Review Necessary:				
Review Conducted:				
office and Table to Destruct				
tific and Technical Review criterion below is worth a maximum of 5 points, for a total of 55 points. Th	e evaluation	n criteria	score is	added
ing funds score to achieve a final score. The maximum score possible is				
	,		•	
Criteria		Circl	e one	
Ontona	Yes	Med	Low	No
	(5)	(3)	(1)	(0)
1. Proposal demonstrates that the project proponent/organization has the		, ,	, ,	
qualifications, experience, and capacity to perform the proposed tasks		3	1	0
(including sub-contracts).				
Project costs are acceptable.	5	3	1	0
3. Education is focused on Bay-Delta sport fisheries management and	5	3	1	0
fisheries conservation issues.				_
4. The magnitude or severity of the issue/problem addressed by the	5	3	1	0
<ul><li>proposed project is high.</li><li>The magnitude of the need for the services to be provided or the</li></ul>				
activities to be carried out by the proposed project is high.	5	3	1	0
Project tasks would address the stated issue/problem.	5	3	1	0
7. The importance or magnitude of the results/benefits likely to be attained.	24			
by the proposed project is high.	5	3	1	0
8. The proposal clearly defines the project goals and objectives and how			1	_
those goals and objectives will be met.	5	3	1	0
9. The proposal clearly defines the target audience.	5	3	1	0
10. Includes an evaluation plan which contains elements specified in the	5			0
PSN.				_
11. Project demonstrates stakeholder support.	5	3	1	0
Sco	re			
Total Dair	nts Possibl	o from c	shava. E	E
Total Poli	112 5022101	e iroin a	above. S	99
Subto	tal from abo	ove:		
				_
Level of matching funds and resource	s (from mat	rix):		
	F:			
	Final Sc	ore:		_

#### Public School Watershed and Fishery Conservation Education Projects (ED)

Proposal#: Region: Reviewer:	Date://
Proposal Name:	
Field Review Necessary:	
Field Review Conducted:	

<u>Scientific and Technical Review</u>
Each criterion below is worth a maximum of 5 points, for a total of 70 points. The evaluation criteria score is added to the matching funds score to achieve a final score. The maximum total score possible is 75; the lowest score possible is 0.

Criteria	Circle one			
	Yes (5)	Med (3)	Low (1)	No (0)
Instruction is focused on watershed and fishery conservation.	5	3	1	0
2. Proposal demonstrates that the project proponent/organization has the qualifications, experience, and capacity to perform the proposed tasks (including sub-contracts).	5			0
3. Proposal includes information required in PSN Part III. (Yes = all supplemental information is included, Low = missing one or more pieces of supplemental information, No = no supplemental information included)	5		1	0
4. The magnitude or severity of the issue/problem addressed by the proposed project is high.	5	3	1	0
5. The magnitude of the need for the services to be provided or the activities to be carried out by the proposed project is high.	5	3	1	0
6. Project tasks would address the stated issue/problem.	5	3	1	0
7. The importance or magnitude of the results/benefits likely to be attained by the proposed project is high.	5	3	1	0
8. If education materials are to be developed – submitted an outline of proposed new materials which includes the correlation with the National Project for Excellence in Environmental Education Guidelines and /or California Department of Education Content Standards	5			0
9. Project using established materials and curriculum - identified the material(s) and how it corresponds to current California Department of Education Content Standards and/or National Science Content Standards.	5			0
<ol> <li>Includes an evaluation plan which contains elements specified in the PSN (i.e. specific learning objectives and tools to measure gains of students, teachers, and/or community).</li> </ol>	5	3	1	0
11. Project materials address conditions of the local watershed and fisheries conservation issues.	5	3	1	0
12. Project includes hands-on activities and promotes personal responsibility for watershed stewardship with the overarching goals of students, families, and communities understanding the nature of fisheries resources and the effects of their own and others actions.	5	3	1	0
13. Project budget is appropriate to the work proposed and the potential results gained.	5	3	1	0
14. Project demonstrates stakeholder support.	5	3	1	0
Score				

Score	
Total Points Po	ssible from above: 70
Subtotal fro	m above:
Level of matching funds and resources (from	n matrix):
Fin	al Score:
BDSFES Priority: high, medium, low, do not fund. Justify in comments.	

# **Fisheries Conservation (FC)**

	posal#:Region: Reviewer:		Date:		<i>_</i>
Fie	pposal Name:ld Review Necessary:ld Review Conducted:				
Eac	entific and Technical Review ch criterion below is worth a maximum of 5 points, for a total of 45 points. The evaluation to the score to achieve a final score. The maximum score possible is 50; the				d to the
	Criteria		Circle	one	
	- Criteria	Yes (5)	Med (3)	Low (1)	No (0)
1.	Proposal demonstrates that the project proponent/organization has the qualifications, experience, and capacity to perform the proposed tasks (including subcontracts).	5	3	1	0
2.	Project costs are acceptable.	5	3	1	0
3.	Species benefited are listed as endangered or threatened under state or federal endangered species acts.	5			0
4.	The magnitude or severity of the issue/problem addressed by the proposed project is high.	5	3	1	0
5.	The magnitude of the need for the services to be provided or the activities to be carried out by the proposed project is high.	5	3	1	0
6.	Project tasks would address the stated issue/problem.	5	3	1	0
7.	The importance or magnitude of the results/benefits likely to be attained by the proposed project is high.	5	3	1	0
8.	The proposed project would provide information to assist with fisheries management decisions or result in recommendations for fisheries restoration or management actions.	5	3	1	0
9.	Project demonstrates stakeholder support.	5	3	1	0
	Score		•		
	Total Points Pos Subtotal from Level of matching funds and resources (from	n above:_			
	Fina	al Score:_			
	BDSFES Priority: high medium low do not fund .Justify in comments				_

# **Habitat Acquisition and Conservation Easements (HA)**

reposal Name:	
criteria Cri	
criterion below is worth a maximum of 5 points, for a total of 55 points. The evaluation criteria score is ad atching funds score to achieve a final score. The maximum score possible is 60; the lowest score possible is core. The maximum score possible is 60; the lowest score possible is core.    Criteria	
ch criterion below is worth a maximum of 5 points, for a total of 55 points. The evaluation criteria score is additching funds score to achieve a final score. The maximum score possible is 60; the lowest score possible is    Criteria	
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Criteria   Circle one   Yes   Med   Low (5)   (3)   (1)	
Criteria  Circle one  Yes Med Low (5) (3) (1)  1. Proposal demonstrates that the project proponent/organization has the qualifications, experience, and capacity to perform the proposed tasks (including subcontracts).  2. Proposal includes information required in PSN Part III, including appraisal, formal management agreement, easement language, or MOU showing the property will be properly managed and maintained with identified funding sources (Yes = all supplemental information is included, Low = missing one or more pieces of supplemental information, No = no supplemental information included, Low = missing one or more pieces of supplemental information, No = no supplemental information included.  3. The budget is substantiated by the appraisal.  4. Species benefited are listed as endangered or threatened under state or federal endangered species acts.  5. The magnitude or severity of the issue/problem addressed by the proposed project is high.  6. There is a need for the proposed project in the project area.  7. The real property is being acquired (fee title or conservation easement) from a willing seller.  8. The proposed project would successfully preserve existing high-quality fish habitat, or would result in recovery and restoration of fish habitat to a high quality level.  10. The acquisition is free of: significant obstacles to maintaining or restoring water quality (toxics, pesticides, salts); hazardous conditions or materials; restrictive water rights issues; restrictive cultural or historical resources; public use conflicts; restrictive deeds, easements, or other agreements;	J. 
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5. The magnitude or severity of the issue/problem addressed by the proposed project is high.  6. There is a need for the proposed project in the project area.  7. The real property is being acquired (fee title or conservation easement) from a willing seller.  8. The proposed project is based on sound planning/assessment information.  9. The proposed project would successfully preserve existing high-quality fish habitat, or would result in recovery and restoration of fish habitat to a high quality level.  9. The acquisition is free of: significant obstacles to maintaining or restoring water quality (toxics, pesticides, salts); hazardous conditions or materials; restrictive water rights issues; restrictive cultural or historical resources; public use conflicts; restrictive deeds, easements, or other agreements;	(
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from a willing seller.  3. The proposed project is based on sound planning/assessment information.  5. The proposed project would successfully preserve existing high-quality fish habitat, or would result in recovery and restoration of fish habitat to a high quality level.  10. The acquisition is free of: significant obstacles to maintaining or restoring water quality (toxics, pesticides, salts); hazardous conditions or materials; restrictive water rights issues; restrictive cultural or historical resources; public use conflicts; restrictive deeds, easements, or other agreements;	Η,
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2. The proposed project would successfully preserve existing high-quality fish habitat, or would result in recovery and restoration of fish habitat to a high quality level.  10. The acquisition is free of: significant obstacles to maintaining or restoring water quality (toxics, pesticides, salts); hazardous conditions or materials; restrictive water rights issues; restrictive cultural or historical resources; public use conflicts; restrictive deeds, easements, or other agreements;	<del></del> ,
habitat, or would result in recovery and restoration of fish habitat to a high quality level.  10. The acquisition is free of: significant obstacles to maintaining or restoring water quality (toxics, pesticides, salts); hazardous conditions or materials; restrictive water rights issues; restrictive cultural or historical resources; public use conflicts; restrictive deeds, easements, or other agreements;	(
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restrictive water rights issues; restrictive cultural or historical resources; public use conflicts; restrictive deeds, easements, or other agreements;	
public use conflicts; restrictive deeds, easements, or other agreements;	
public use conflicts; restrictive deeds, easements, or other agreements;	,
· ·	(
inadequate access for management purposes; in-holdings or property	
boundaries that limit or preclude management options.	
1. Project demonstrates stakeholder support. 5 3 1	(
Score	
<u>'</u>	
Total Points Possible from above: 55	
Subtotal from above:	
Level of matching funds and resources (from matrix):	
Final Score:	
Filial Score	
BDSFES Priority: high, medium, low, do not fund. Justify in comments.	

# Barrier Modification for Fish Passage (HB) and Estuary and Instream Habitat Restoration (HI)

Proposal#: Project Type: Region:Reviewer:Proposal Name:			/	<i>-</i>
Field Review Necessary:				
Field Review Conducted:				
Scientific and Technical Review				
Each criterion below is worth a maximum of 5 points, for a total of 70 points. The ev	aluation crite	ria score	is adde	d to the
matching funds score to achieve a final score. The maximum score possible is 75; the				
		·		
Criteria		Circle or	ne	
• · · · · · · · · · · · · · · · · · · ·	Yes	Med	Low	No
	(5)	(3)	(1)	(0)
Proposal demonstrates that the project proponent/organization has the	` ,	` `	Ì	1
qualifications, experience, and capacity to perform the proposed tasks	5	3	1	0
(including subcontracts).				
2. Proposal includes information required in PSN Part III. (Yes = all				
supplemental information is included, Low = missing one or more pieces of	5		1	0
supplemental information, No = no supplemental information included).	_	_		
3. Project costs are acceptable.	5	3	1	0
4. Species benefited are listed as endangered or threatened under state or	5			0
federal endangered species acts.  5. The magnitude or severity of the issue/problem addressed by the proposed			'	
5. The magnitude or severity of the issue/problem addressed by the proposed project is high.	5	3	1	0
6. The magnitude of the need for the services to be provided or the activities to				
be carried out by the proposed project is high.	5	3	1	0
7. Project tasks would address the stated issue/problem.	5	3	1	0
The importance or magnitude of the results/benefits likely to be attained by				
the proposed project is high.	5	3	1	0
9. Limiting factors have been identified within the watershed: (Such as				
Spawning, Over-winter habitat, Summer Rearing, Escape Cover, Passage,	5	3	1	0
etc).				
10. Extent to which proposed project corrects key limiting factors identified within	5	3	1	0
the watershed. Yes = all; Med = most; Low = some; No = none	_			
11. Project demonstrates stakeholder support.	5	3	1	0
Field Level Review – Technique, location, application				
12. The problems have been adequately identified and the techniques proposed	_		4	
are appropriate for the stream/river system. Yes = all; Med = some; Low =	5	3	1	0
few; or No = none  13. The project will utilize DFG acceptable techniques.	5	3	1	0
14. Project materials utilized are the appropriate for the appropriate size, type,	3		<u>'</u>	-
and species for the project area and watershed.	5	3	1	0
Score				I.
Total Points F	Possible fro	m above:	70	
Subtotal fr	om abovo:			
Subtotal II	om above:			
Level of matching funds and resources (fro	om matrix):			
F	inal Score:_			

BDSFES Priority: high, medium, low, do not fund. Justify in comments.

# **Research Projects (RP)**

	Deview Necessary				
ield	Review Necessary:				
	Review Conducted:				
cian	ntific and Technical Review				
	criterion below is worth a maximum of 5 points, for a total of 65 points. The evalua	tion crite	eria score	e is adde	d to t
	ning funds score to achieve a final score. The maximum score possible is 70; the lo				
			•		
	Criteria		Circle	one	
	Ontena	Yes	Med	Low	No
		(5)	(3)	(1)	(0)
1.	Proposal demonstrates that the project proponent/organization has the	, ,	` ′	` '	
	qualifications, experience, and capacity to perform the proposed tasks (including	5	3	1	0
	subcontracts).				
	Proposal includes information required in PSN Part III (Yes = all supplemental information is included, Low = missing one or more pieces of supplemental	5		1	0
	information, No = no supplemental information included).	5		ı	0
	Project costs are acceptable.	5	3	1	0
	Project is focused on species listed as endangered or threatened under state or				
	federal endangered species acts.	5			0
5.	The magnitude or severity of the issue/problem addressed by the proposed	5	3	1	0
	project is high.		, ,		
	The magnitude of the need for the services to be provided or the activities to be	5	3	1	0
	carried out by the proposed project is high.	5	2		
	Project tasks would address the stated issue/problem.  The importance or magnitude of the results/benefits likely to be attained by the	5	3	1	0
	proposed project is high.	5	3	1	0
		5	3	1	0
	The proposed project would provide information to assist with fisheries				
	management decisions or result in recommendations for fisheries restoration or	5	3	1	0
	management actions.				
	The proposed project addresses issues associated with Pelagic Organism	5	3	1	0
	Decline in the Delta.				
	The project will utilize DFG acceptable protocols and techniques.  Project demonstrates stakeholder support.	5	3	1	0
13.	Score	5	3	<u> </u>	0
	COOLC				
	Total Points Pos	sible fro	m above	e: 65	
	Subtotal from	above:_			
	lovel of mostabine finade and mostable	n a triss) :			
	Level of matching funds and resources (from r	natrix):_			
	Final	Score:			
	Tilla	3 2 <b>3</b> . <b>0</b>		-	

# **Advisory Committee Review**

The BDSFES Advisory Committee evaluates and scores each proposal based on the following criteria. Each criterion below is worth a maximum of 10 points. Points are added to achieve a total score. The maximum total score is 90: the lowest score is 0.

	Score		
Criteria	Yes (10)	No (0)	Low to High (1 through 9)
Legislative Requirements			
BDSFES funds would not replace funding that would otherwise be allocated to Bay-Delta sport fisheries from the sale of fishing licenses, the California Bay-Delta Authority, or other federal, state, or local funding sources.			
Magnitude of the Problem			
The magnitude or severity of the problem/issue addressed by the proposed project is high and clearly justified in the project proposal.			
Urgency of the Project			
The magnitude of the need for the services to be provided or the activities to be carried out by the proposed project is high.			
Magnitude of the Benefits			
The importance or magnitude of the results/benefits likely to be attained by the proposed project is high.			
Duration of the Benefits			
The expected benefits/results of the proposed project are sustainable.			
Likelihood of Success			
There is low risk of failure by doing this project based on the DFG Technical Review Team's evaluation of the proposal.			
Matching Funds			
The proposed project would provide a high percentage of matching funds as determined from the matching funds matrix.			
Feasibility			
The applicant has developed a credible project and the proposed project is financially feasible.			
Cost-Benefit			
Project budget is appropriate to the work proposed and the potential results gained.			
Total Score			

Comments: